



## UNITED STATES PATENT AND TRADEMARK OFFICE

UNITED STATES DEPARTMENT OF COMMERCE  
 United States Patent and Trademark Office  
 Address: COMMISSIONER FOR PATENTS  
 P.O. Box 1450  
 Alexandria, Virginia 22313-1450  
 www.uspto.gov

## BIB DATA SHEET

CONFIRMATION NO. 2458

<b>SERIAL NUMBER</b> 09/877,926	<b>FILING or 371(c) DATE</b> 06/08/2001 <b>RULE</b>	<b>CLASS</b> 705	<b>GROUP ART UNIT</b> 3691	<b>ATTORNEY DOCKET NO.</b> 019213-0311368	
<b>APPLICANTS</b> Paul H. Robb, Tucson, AZ; <b>** CONTINUING DATA *****</b> This application is a CIP of 09/732,008 12/08/2000 which claims benefit of 60/210,460 06/09/2000 <b>** FOREIGN APPLICATIONS *****</b> <b>** IF REQUIRED, FOREIGN FILING LICENSE GRANTED ** ** SMALL ENTITY **</b> 07/09/2001					
Foreign Priority claimed <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 35 USC 119(a-d) conditions met <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Verified and /KELLY SCAGGS Acknowledged CAMPEN/ Examiner's Signature	<input type="checkbox"/> Met after Allowance Initials	<b>STATE OR COUNTRY</b> AZ	<b>SHEETS DRAWINGS</b> 43	<b>TOTAL CLAIMS</b> 56	<b>INDEPENDENT CLAIMS</b> 4
<b>ADDRESS</b> PILLSBURY WINTHROP SHAW PITTMAN, LLP P.O. BOX 10500 MCLEAN, VA 22102 UNITED STATES					
<b>TITLE</b> Method and system for enabling collaboration between advisors and clients					
<b>FILING FEE RECEIVED</b> 889	FEES: Authority has been given in Paper No. _____ to charge/credit DEPOSIT ACCOUNT No. _____ for following:		<input type="checkbox"/> All Fees <input type="checkbox"/> 1.16 Fees (Filing) <input type="checkbox"/> 1.17 Fees (Processing Ext. of time) <input type="checkbox"/> 1.18 Fees (Issue) <input type="checkbox"/> Other _____ <input type="checkbox"/> Credit		